Evergreen Indiana Cataloging Policy

The Evergreen Indiana Consortium is committed to coordinating a database of high-quality bibliographic records for collective use by member libraries. These bibliographic records are the shared property of the consortium.   Maintaining the quality and integrity of each bibliographic record is an interest and a responsibility shared by all member libraries.

With recommendations from the Evergreen Indiana Catalog Committee, the Evergreen Indiana Executive Committee sets standards for these records. The Evergreen Indiana Cataloging Committee oversees quality assurance and training.

This Cataloging Policy is supplemented by the Evergreen Indiana Cataloging Procedures Guide and the Evergreen Indiana Training Manual.

Evergreen Indiana reserves the right to revoke cataloging privileges of any member library if the requirements of this policy are not met. Training for all catalogers new to Evergreen Indiana is mandatory.

Evergreen Indiana Cataloging Standards

1. Training

All Evergreen catalogers are expected to have a good understanding of MARC bibliographic records and be familiar with current cataloging standards in use by the Library of Congress. Only Evergreen trained catalogers may perform cataloging functions in Evergreen Indiana.

Two levels of Evergreen training must be achieved in order to perform all cataloging functions. Copy Catalogers (CAT 2) have received the Introduction to Cataloging training. Certified (CAT 1) catalogers have successfully completed the Evergreen Indiana Advanced Cataloging class.

All member libraries must have at least one Certified (CAT 1) cataloger on their cataloging staff or an agreement in place with another Evergreen Indiana library that has a certified CAT 1 cataloger. The written agreement needs to be on file with the Evergreen Indiana Executive Committee care of the Indiana State Library. The agreement may be stated as follows: We will provide CAT 1 cataloging services for [Name of Library] for [fee] each year.

A staffing survey will be conducted each January to confirm that each member library complies with this requirement. The survey will ask for the name and email address of each CAT 1 cataloger as well as the name and email address of any other members of the library's staff who should be included in the Evergreen Indiana Cataloging Listserv.

Certified Copy Catalogers (CAT 2) All Evergreen catalogers must be trained by an Evergreen Certified CAT1 cataloger.   Trainees may attend the Introduction to Cataloging class at the State Library or be trained by a CAT 1 cataloger at their own or another library. Catalogers who receive this basic training are copy catalogers and may:

- Attach holdings to existing bibliographic records
- Edit volume and copy level data

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Certified Catalogers (CAT 1) Advanced Evergreen cataloging training is required before catalogers may overlay existing records, create original records, edit records, and delete records. The EI Cataloging Committee is responsible for this Evergreen Indiana Advanced Cataloging class which is offered several times a year at locations throughout the state. Certified Catalogers (CAT 1) may:

- Do everything allowed to Copy Catalogers
- Import new records via Z39.50
- Import records via batchloading
- Overlay existing records
- Create original bibliographic records
- Add new fields to bibliographic records
- Merge bibliographic records
- Update bibliographic records
- Delete existing bibliographic records
- Delete fields in existing bibliographic records prior to or after import

2. Permanent Record Standards

Evergreen Indiana is committed to maintaining a database of high quality bibliographic records for collective use by member libraries.

Before adding holdings to any permanent bibliographic record, the record must be brought to standards as outlined below and in the Evergreen Indiana Cataloging Procedures Guide.

Bibliographic records must:

- Use MARC Format for Bibliographic Data
- Contain core level fields as defined by Library of Congress's Bibco Core Record Standards
- Comply with current cataloging standards in use by the Library of Congress, except where otherwise directed by the Evergreen Indiana Cataloging Procedures Guide.
- Not be imported unless 1) there is no existing matching record as defined in the Procedures Guide or 2) the existing matched record is being overlaid.
- Use standard GMD terminology
- Contain only bibliographic-level data, not holding specific information
- Contain at least one Library of Congress Subject Heading (LCSH)
- Be compared with the item in hand

3. Maintenance standards

Member libraries are expected to:

- Keep their holdings current
- Designate a staff member to monitor the Evergreen Indiana Catalog Listserv
- Resolve problems as reported to them by the Evergreen Indiana Cataloging Committee
- Respond to staffing surveys conducted by the Evergreen Indiana Cataloging Committee

Notices
All notices coming from the Evergreen Indiana Cataloging Committee will be given via the Evergreen Indiana Catalog Listserv.

Revocation of Privileges
Evergreen Indiana reserves the right to revoke the cataloging privileges of any member library if its work repeatedly fails to meet with the established standards set by the consortium or if the cataloging training requirements are not maintained. Member libraries must meet the training requirements for the CAT 1 certification within the first year after migration and a CAT 1 cataloger must be maintained on staff going forward.

The cataloging privileges of a member library will not be revoked prior to consultation with the member library's director, cataloging staff, and if necessary, the library board of directors.

Reporting and resolving problems
Problems or complaints regarding record quality or errors should be sent to the Evergreen Indiana Cataloging Committee. The Evergreen Indiana Cataloging Committee is the final authority in resolving quality concerns.